south carolina
STATE LIBRARY

State Aid Package for Public Libraries
FY 2007 – Revised Forms and Instructions

The State Aid package has been completely revised, and evaluation procedures have been streamlined, to make the application and funding process easier and more efficient. These new forms and procedures conform to the requirements of State Aid legislation.

Highlights:

- The State Aid Budget Form is now an electronic spreadsheet that will *automatically calculate totals and allocation percentages.*
- *No separate statements* are required for the Library's long-range plan, collection development policy, or technology plan.
- Revised Budget and Transfer Request forms *target large categories only*.
- Forms make best use of available technologies. *Use of electronic form is encouraged.*

The following previously required forms have been eliminated:

- Organizational chart
- List of Personnel
- Friends of the Library form
- Capital Assets Inventory form
- Annual Outlet Data report

- New/revised position descriptions and policies
- Bookmobile schedules and other PR materials
- Civil Rights and ADA Assurance of Compliance

Please note: The State Library will continue to collect the information previously submitted on the eliminated forms. This important information is used to maintain a complete picture of South Carolina library operations. Where possible, the information has been incorporated into the revised State Aid forms. The State Library is investigating other (electronic) means of collecting such information.

Instructions for completing State Aid forms follows. Every effort has been made to ensure that the new forms are easy to use. Please report any difficulties with the format, and suggest any needed improvements.

The completed State Aid package is due September 15, 2006.

The State Library will be happy to answer questions you may have during the application process. Please contact Felicia Vereen with questions or comments by email at fvereen@statelibrary.sc.gov or by phone at 803-734-8645 or by AOL Instant Messenger at screen name FDVereen.

State Aid Package - Required Documents

All forms are posted on the State Library's website [http://www.statelibrary.sc.gov/], under "Services to Libraries—Funding for Libraries." You are strongly encouraged to complete the forms electronically, in order to take advantage of the self-calculating features. Forms must then be printed and submitted with original signatures.

The complete State Aid package as submitted must include:

- **State Aid Agreement, Parts I and II,** approved by the Library Board and signed by the Board Chair
- **Maintenance of Effort Report and Declaration** signed by the County/City Manager or Finance Officer, and by the Library Director
- Updates to **List of Current Library Trustees**, as needed

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1. State Aid Agreement, Parts I and II

Part I: State Aid Agreement
The Agreement form has been completely revised; Library Trustees and the Library Director are encouraged to read over the document carefully. *The Agreement is a contract between the South Carolina State Library and the named County Library.*

Enter the proposed total expenditure for FY2007, and the total expended in FY2005. Provide the <u>dates</u> of the most recent collection development policy, long-range plan, and the certification period of the Library's technology plan.

Part II: Proposed Library Budget
The Budget Form may be completed in Microsoft Excel or other compatible spreadsheet software. Enter the amounts budgeted from Local Funds and State Aid for each category.

- **Local funds include only those funds from local appropriations.** *Do not include state or federal grants, memorials, gifts, fees, interest, or other non-tax revenues.*

- **State Aid funds include only those designated specifically as state aid.** *Do not include funds from the South Carolina Education Lottery or other state or federal grants.*

The spreadsheet calculates totals for each column and the allocation percentages for each category. The Library must adopt a proportionally balanced budget, with 65-70% of the total budget allocated for Personnel, 15-20% for Information Resources, and 10-20% for Other Operating Expenses ("maintenance.") Print the completed form, and attach it to Part 1 of the State Aid Agreement.

Allowed expenditures in each category:
- **Personnel**: Wages and benefits only
- **Information Resources**: Print/books, serial subscriptions, electronic resources (E-books, databases, etc.), microforms, audiovisual materials, preservation (supplies, services, etc.)

- **Other Operating Expenses**: Continuing education for staff and/or trustees (fees/expenses for conferences, workshops, consultants, etc.), library furniture, library/office equipment, bookmobile operations, contractual services, audit

2. Maintenance of Effort Report and Declaration

This document establishes the amount of local funding the County must provide in the coming fiscal year. State Aid regulations require the County to provide local funds that are greater than or equal to the amount of local funds expended by the Library in the second preceding year. For example, if the Library expended $10,000 in local funds in FY2005, the County must provide at least $10,000 in local funds in FY2007.

Libraries that receive millage must receive either the same number of mills as provided in the second preceding year, OR the amount generated by the mills must be greater than or equal to the amount expended by the Library in the second preceding year. In other words, if the number of mills is reduced, the County must still comply with the maintenance of effort regulation. For example, if a Library receives three mills in FY2005 and those mills provide $10,000 in funding, the Library must still receive $10,000 in FY2007, even if the number of mills drops to two.

This form also requests the expected delivery date for the FY2006 audit.

The *Maintenance of Effort Report and Declaration Form* should be completed and signed by either the City/County Manager or the County Finance Officer. The Library Director's signature is also required.

3. List of Current Library Trustees

The State Library maintains a current database of Library Trustees. A list of your Library Board members' contact information is attached. Please make any needed changes directly on this list, and return it with the State Aid package.

Please submit complete State Aid packages by September 15, 2006 to:
Felicia Vereen
Library Development Services
P.O. BOX 11469
Columbia, SC 29211

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Other revisions:

The **Request for Transfer or Revisions of State Aid Budgets** form has been reformatted to mirror the new Budget form. *Only transfers between the three major budget categories will require approval from the State Library.* This form can be completed in Microsoft Excel or other compatible spreadsheet software. The form calculates totals for each column and for the adjusted budget.